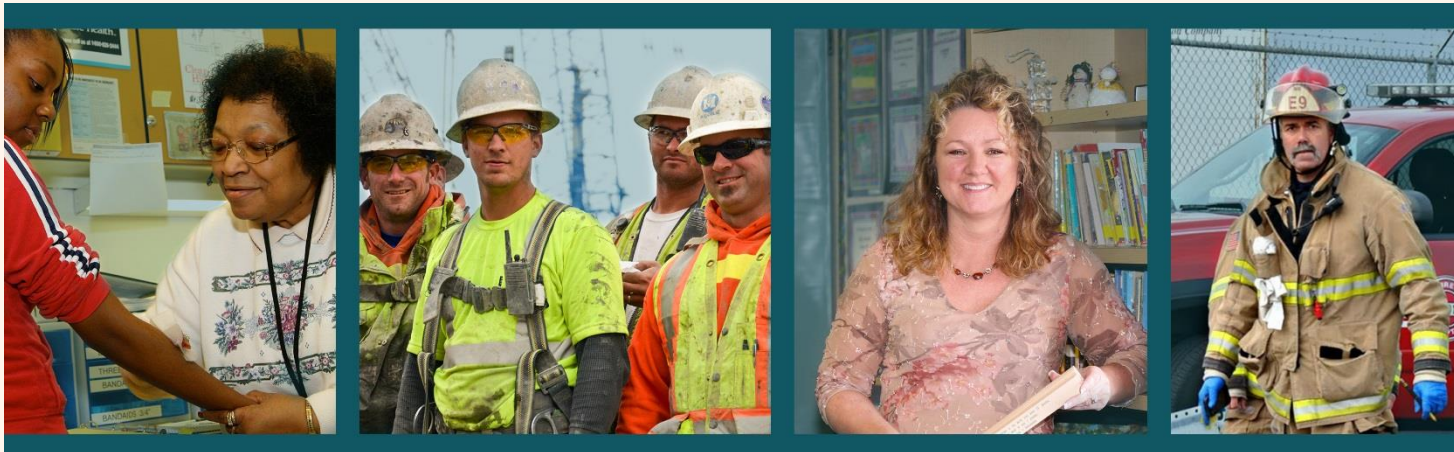


DEPARTMENT OF RETIREMENT SYSTEMS

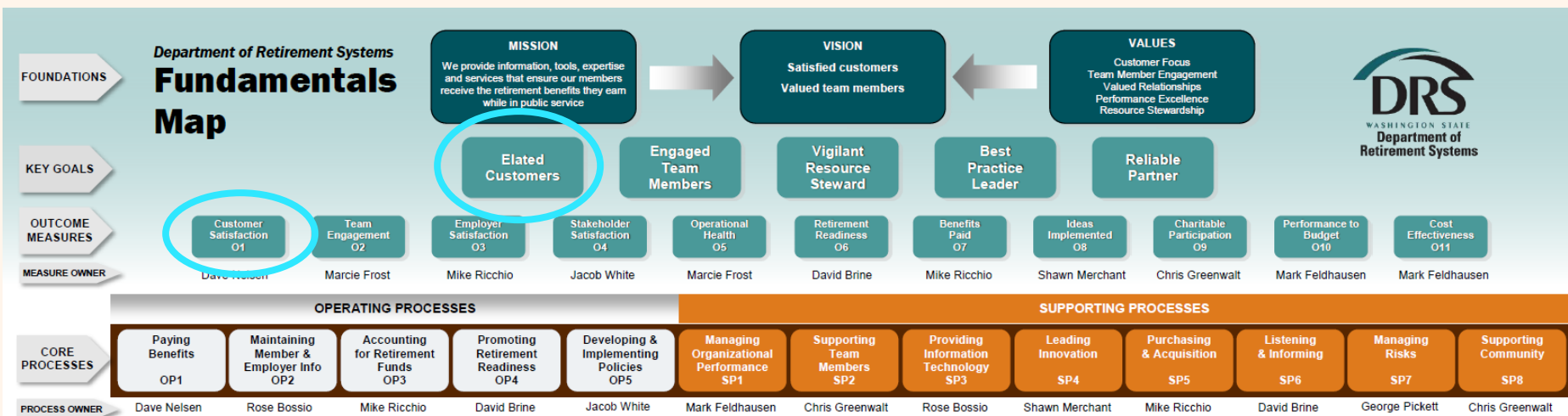
Customer Satisfaction

Presentation to Employer Advisory Committee

May 21, 2015



Key Goal: Elated Customers



DRS focuses on five Key Goals, one of which is elating our customers. Our customers are the people enrolled in, or receiving benefits from, a DRS-administered plan. We serve them in partnership with employers and other stakeholders.

At DRS we don't just want to meet our customers' expectations, we want to exceed them.

Customers' Expectations

The Three R's of DRS Customer Satisfaction: Respectful, Responsive, and Right

When interacting with DRS, you can expect

To be treated **RESPECTFULLY**. You can expect

- A. To be treated as a valued customer by a patient and caring person, who is happy to help you.
- B. To be carefully guided through the retirement process.
- C. To be informed of the issues that impact your retirement in a way that is easy to understand.

To receive **RESPONSIVE** service. You can expect

- A. To have quick access to people who can help you.
- B. To receive timely responses to your requests.
- C. To be kept informed of the status of your requests.
- D. To speak with people who anticipate your needs and offer you solutions.
- E. To be provided with easy-to-use forms and tools that can be found online.

Information to be **RIGHT**. You can expect

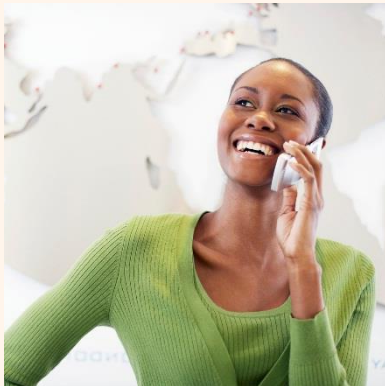
- A. To receive accurate information from a knowledgeable, professional person.
- B. To be paid correctly and on time.

Interviewing Recent Retirees

Each month, Leaders at DRS contact a recent retiree to collect their feedback about our processes. The contact is an interview, not a survey.

We ask open-ended questions to get at the stories behind how we did, or did not, meet their expectations. We hope to learn where we can improve.

Since March 2013, we've completed 2,287 interviews.



Measuring Satisfaction

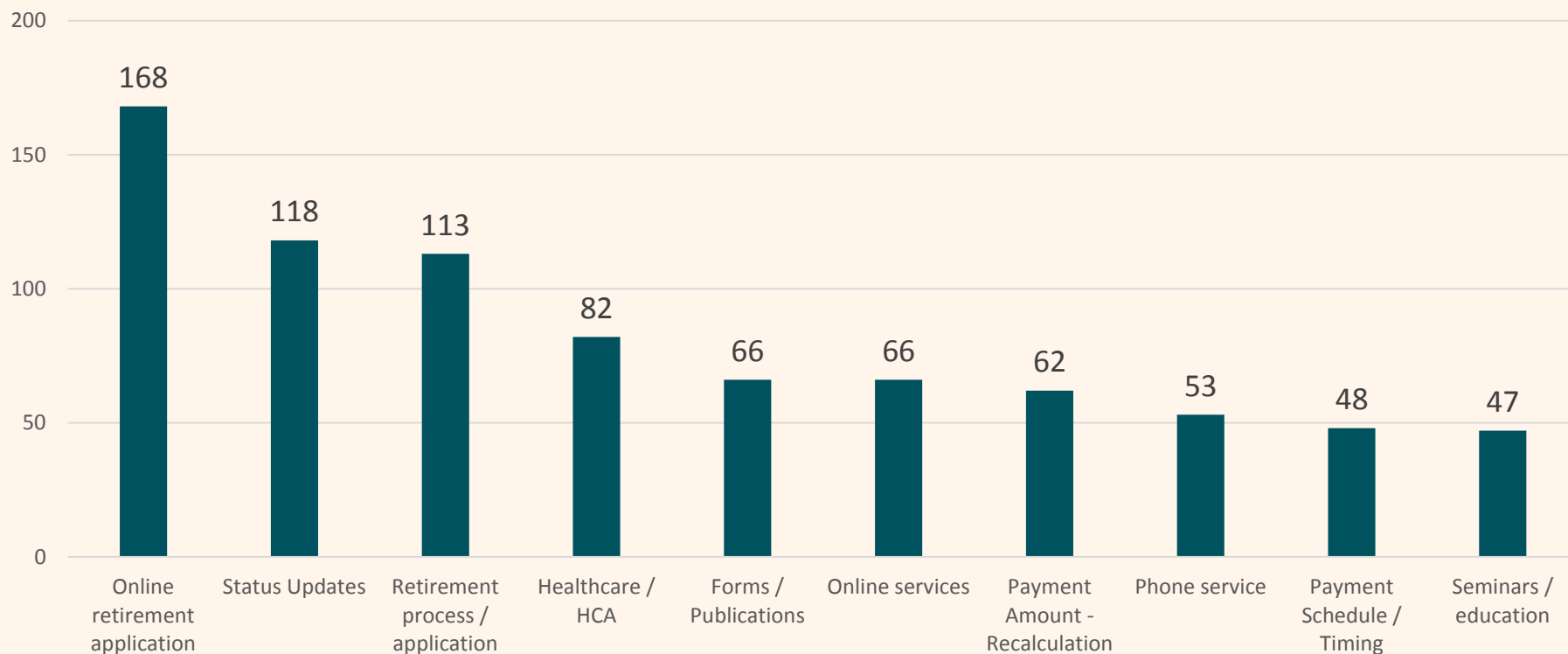
Our goal is that 80% or more of customers will feel that their expectations were met or exceeded, for each of the 10 criteria.

O1-Customer Satisfaction (Dave)

RESPECT	Valued Customer	95	94	96	97
	Carefully Guided	90	89	90	90
	Informed of Issues	86	85	89	90
RESPONSIVE	Quick Access	95	93	95	92
	Timely Response	90	89	91	89
	Informed Status	84	83	80	77
	Anticipate Needs	91	89	93	91
RIGHT	Online Tools	91	90	88	90
	Accurate Info	93	90	94	94
	Correct/Timely \$	93	96	95	94
		QTR 8	QTR 9	QTR10	QTR11

Customer Feedback

Top Ten Topics: Opportunities – Last 12 Months
Based on the number of times customers mentioned
an opportunity related to each topic



Customer Feedback

We use customer feedback to prioritize improvements. A team representing business areas and technology resources reviews potential enhancements and looks at which key goals, like Elated Customers, the idea will touch, and to what degree. Improvements are scored based on their value, and cost.

Improvements with higher value and lower costs are implemented first.



Customer Feedback: ORA


- The Online Retirement Application was really easy to use and the member stated she preferred to do everything online. **She just didn't like that it did not let her know she hadn't finalized her application.**
- Member was sometimes **confused by when they would hear back from DRS, like, how long would it take to process their application?**
- Member retired online, and she was surprised that she didn't get confirmations to keep her informed as her application was processed. She said she would have liked to see more communication regarding the status of her retirement. She said she worried about whether or not she'd really get her retirement check.
- Member said there was a **misunderstanding about the need for additional documents when applying for retirement online** and this caused some confusion.
- Member had **concerns about the lack of communication while waiting for their first payment.** They felt there was a lack of clarity of the application status “in process” when they check the website.

Enhancements

- Steps to Retirement
- Tracker Page
- Periodic Email Notifications

Steps to Retirement


- Replaced the “I Want To” page



WASHINGTON STATE DEPARTMENT OF RETIREMENT SYSTEMS
Making it easy to see your future
360-664-7000 | 800-547-6657

[DRS Home](#) | [Contact Us](#) | [Log Off](#)

Online Account Access



Apply For PERS 2 Retirement

[Steps to Retirement](#) | [Plan for Retirement](#) | [Request/View Estimate](#) | [Apply for Retirement](#)

We want to make applying for retirement as easy as possible. Below are some tools to assist you with planning for retirement.

Step 1 Retirement Eligibility	Retirement Eligibility Before you can retire you must meet certain eligibility criteria. The eligibility rules for your system and plan are: <ul style="list-style-type: none"> • Unreduced benefit at age 65 if you have at least five service credit years; or • Reduced benefit at age 55 if you have at least 20 service credit years. There is less of a benefit reduction for early retirement if you have 30 or more years of service credit.
Step 2 Plan for Retirement	Begin planning for your retirement early. Find out what things you can do to get prepared.
Step 3 Request/View Your Estimate	A Retirement Specialist has completed your estimate. You can apply for retirement or you can request an estimate for an alternative retirement scenario.
Step 4 Apply for Retirement	Start your retirement application.

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RETIREMENT
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Apply for Retirement

- Step Timeline

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Apply For PERS 2 Retirement

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 [Plan for Retirement](#) |
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 [Apply for Retirement](#)

Before deciding on your intended retirement scenario, you may want to consider how [Cost of Living Adjustments \(COLAs\)](#) may impact your ongoing benefit.

Compare the options available to you! Try our [benefit estimator](#).

STEP 1
Create Estimate

STEP 2
Start Retirement Application

STEP 3
Complete and Submit Retirement Application

STEP 4
Complete and Submit Additional Forms

You Are Done!

DRS Calculated Retirement Estimates

Instructions to apply online

1. Use the left and right arrow indicators to see all estimates prepared for you in the last twenty-five (25) months;
2. Locate the Estimate that matches your retirement criteria;
3. Use the green 'Start My Application' button to start your online retirement application.

Estimates Prepared (5 estimates total)

If you have an estimate for a date within 3 months of your actual retirement date, you may not need to request an additional estimate. Select an estimate below to see if you are eligible to adjust the date.

Estimate ID: 80015322 Prepared On: 07/01/2014	Estimate ID: 80015321 Prepared On: 07/01/2014	Estimate ID: 80015320 Prepared On: 07/01/2014
Retirement Date: 05/01/2017 Separation Date: 06/2015 Average Salary: \$4,848 Survivor Birth Date: 03/28/1958 Option 1 Estimated Benefit \$3515 Option 2: \$2,664 Option 3: \$3,033 Option 4: \$2,900 No Start Button? [Explain this]	Retirement Date: 07/01/2015 Separation Date: 06/2015 Average Salary: \$4,848 Survivor Birth Date: 03/28/1958 Option 1 Estimated Benefit \$3321 Option 2: \$2,517 Option 3: \$2,866 Option 4: \$2,740 Start My Application	Retirement Date: 07/01/2015 Separation Date: 06/2015 Average Salary: \$4,848 Survivor Birth Date: 03/28/1958 Option 1 Estimated Benefit \$3515 Option 2: \$2,664 Option 3: \$3,033 Option 4: \$2,900 Start My Application

Requesting an Estimate
Not seeing an estimate that matches your intended retirement scenario? You may be able to choose a retirement date that is within 3 months of your estimated retirement date. Select an estimate to see the available options. If you need to request an additional estimate you can do so [online](#).

If you are unsure of your retirement date, try our online [benefit estimator](#).

Dissolution of Marriage or Qualified Domestic Partnership
If you need a benefit estimate due to dissolution of marriage or qualified domestic partnership, please [contact us](#).

Retirement Planning
Learn more about [retirement planning](#).

Tracker Page, Submitted Application

- Step Timeline
- Application/Retirement Timeline

Online Account Access

Apply For PERS 2 Retirement

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 [View Estimates](#) |
 [Track My Retirement](#)

• Application has been successfully submitted.

➤ [What to do next](#)

➤ [What you can expect from us](#)

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STEP 2 Start Retirement Application

STEP 3 Complete and Submit Retirement Application

STEP 4 Complete and Submit Additional Forms

You Are Done!

04/28/2015
Date Retirement Application Submitted

04/28/2015
We still need additional forms/documents from you to process your retirement application. Please see forms list in tracking section below.

07/01/2015
Date of Retirement

07/31/2015
First Scheduled Payment

Retirement Tracker

Retirement Application

[Print](#) |
 [View](#) |
 [Cancel](#)

Application Details

Retire Date: 07/01/2015
Submitted Via: Web
Date Submitted: 04/28/2015
Status: Submitted [Explain This](#)


In addition to your application please submit the following:

Forms or Documents Still Required

Form or Document	Date Received	Status
Photocopy of Evidence of Birth Date		Not Received
Photocopy of Evidence of Birth Date for Survivor Beneficiary		Not Received
Spousal/Domestic Partner Consent		Not Received

[Upload Documents](#)

Application Timeline



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➤ **What to do next**

➤ **What you can expect from us**

STEP 1
Create Estimate

STEP 2
Start Retirement Application

STEP 3
Complete and Submit Retirement Application

STEP 4
Complete and Submit Additional Forms

You Are Done!

04/28/2015
Date Retirement Application Submitted

04/28/2015
Without the additional required forms/documents, we may not be able to process your retirement. Please see documents list in tracking section below.

05/01/2015
Date of Retirement

05/31/2015
First Scheduled Payment

Retirement Tracker

Retirement Application

Application Details

Retire Date: 05/01/2015

Submitted Via: Web

Date Submitted: 04/28/2015


Status: Submitted [Explain This](#)

In addition to your application please submit the following:

Forms or Documents Still Required

Form or Document	Date Received	Status
Photocopy of Evidence of Birth Date	04/28/2015	Accepted
Photocopy of Evidence of Birth Date for Survivor Beneficiary	04/28/2015	Received (In Review)
Spousal/Domestic Partner Consent		Not Received

Application Timeline, Continued



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➤ What to do next

➤ What you can expect from us

STEP 1
Create Estimate

STEP 2
Start Retirement Application

STEP 3
Complete and Submit Retirement Application

STEP 4
Complete and Submit Additional Forms

You Are Done!

04/28/2015 Date Retirement Application Submitted	04/28/2015 All additional forms/documents have been received.	05/01/2015 Date of Retirement	05/31/2015 First Scheduled Payment
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Retirement Tracker

Retirement Application

Application Details

Retire Date: 05/01/2015

Submitted Via: Web

Date Submitted: 04/28/2015

Status: Submitted [Explain This](#)

In addition to your application please submit the following:

Forms or Documents Still Required

Form or Document	Date Received	Status
Photocopy of Evidence of Birth Date	04/28/2015	Accepted
Photocopy of Evidence of Birth Date for Survivor Beneficiary	04/28/2015	Accepted
Spousal/Domestic Partner Consent	04/28/2015	Accepted

Periodic Email Notifications

Dear

We have received your retirement application, but our records indicate that we still need additional forms or documents for us to complete your benefit calculation. Please log into your [online account](#), complete and return the forms and/or documents indicated below, without them we may not be able to process your retirement.

Retirement process status

04/22/2015 Date Retirement Application Submitted	<p>04/29/2015 We still need additional forms/documents from you to process your retirement application.</p> <p>Please see forms list in tracking section below.</p>		07/01/2015 Date of Retirement	07/31/2015 First Scheduled Payment
--	--	--	-------------------------------------	---

Forms or documents still required

- Spousal/Domestic Partner Consent - **Not Received**

What to do next

- If you have not already, log into your [online account](#) and print a copy of your submitted application for your records

Periodic Email Notifications

Dear

We have received your retirement application, and our records indicate that we have received all necessary forms and documents. We will begin calculating your benefit in the month of your retirement.

Retirement process status

04/22/2015 Date Retirement Application Submitted	04/29/2015 All additional forms/documents have been received.		07/01/2015 Date of Retirement	07/31/2015 First Scheduled Payment
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What to do next

- If you have not already, log into your [online account](#) and print a copy of your submitted application for your records.
- If you have changed your address in your retirement application, and you are actively employed with a DRS covered employer, please notify them so they can update their records.
- [Contact us](#) if you have questions or need assistance.

What you can expect from us

We will:

- Calculate your benefit amount in the month that you retire and mail you an award letter outlining your benefit.
- Send your benefit payment to your financial institution for direct deposit into your account. Payments are available the last working day of the month.

Periodic Email Notifications

Dear

We have received your retirement application and our records indicate that we have received all necessary forms and documents. We will begin calculating your benefit this month and will send you an award letter outlining your benefit calculation once it has been completed.

Retirement process status

04/22/2015 Date Retirement Application Submitted	04/29/2015 All additional forms/documents have been received.		07/01/2015 Date of Retirement	07/31/2015 First Scheduled Payment
--	---	--	-------------------------------------	---

What to do next

- If you have not already, log into your [online account](#) and print a copy of your submitted application for your records.
- If you have changed your address in your retirement application, and you are actively employed with a DRS covered employer, please notify them so they can update their records.
- [Contact us](#) if you have questions or need assistance.

What you can expect from us

We will:

- Calculate your benefit amount in the month that you retire and mail you an award letter outlining your benefit.
- Send your benefit payment to your financial institution for direct deposit into your account. Payments are available the last working day of the month. Your first payment may be mailed to your financial institution, so it could arrive a day or two later.

Periodic Email Notifications

Dear

You started a retirement application for a 07/01/2015 retirement date. The application has not yet been completed. If you intend to retire on 07/01/2015 please log into your [online account](#), complete the application and submit any necessary forms and or documents.

Retirement process status

04/29/2015 Your retirement application has been started, but not submitted.			7/1/2015 Date of Retirement	07/31/2015 First Scheduled Payment
--	--	--	--------------------------------	---------------------------------------

After you submit your application

- Log into your [online account](#) and print a copy of your submitted application for your records.
- Complete and return the required forms and/or documents identified above and be sure to include your name and SSN.
- Revisit the [DRS website](#) before your retirement date to assure we have received the necessary documents..
- Keep in mind if you do not provide the necessary forms/documentation to DRS, it may result in a delay processing your application or possibly result in a temporary suspension of your benefit payments.
- If you have changed your address in your retirement application, and you are actively employed with a DRS covered employer, please notify them so they can update their records.
- [Contact us](#) if you have questions or need assistance.

What you can expect from us

We will:

- Calculate your benefit amount in the month that you retire and mail you an award letter outlining your benefit.
- Send your benefit payment to your financial institution for direct deposit into your account. Payments are available the last working day of the month. Your first payment may be mailed to your financial institution,

Periodic Email Notifications

Dear ,

We have received your retirement application, but our records indicate that we still need additional forms or documents for us to complete your benefit calculation. Please log into your [online account](#), complete and return the forms and/or documents indicated below, without them we may not be able to process your retirement.

Retirement process status

04/29/2015 Date Retirement Application Submitted	04/29/2015 Without the additional required forms/documents, we may not be able to process your retirement.	05/01/2015 Date of Retirement	05/31/2015 First Scheduled Payment
	Please see documents list in tracking section below.		

Forms or documents still required

- Spousal/Domestic Partner Consent - **Not Received**

What to do next

- If you have not already, log into your [online account](#) and print a copy of your submitted application for your records.
- Complete and return the required forms and/or documents identified above and be sure to include your name and SSN.
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Questions?